Project Definition - Instructions

Filling in the Advanced Chat workbook

1 Document history

Version	Date	Author	Note
1.0	2019-02-18	Jonas Hanning	Created

2 Table of content

3 General

3.1 Description

Provides some general information that will be needed during the implementation.

3.2 Fields

3.2.1 Contact Person / Role

Contact person(s) that should be the first point of contact regarding the workbook and its contents, preferably the person responsible for filling it out.

3.2.2 Time Zone(s)

The time zone(s) that agents using Advanced Chat will be located in.

3.2.3 Domains/Environments

A list of all domains/environments where the Advanced Chat script tag will be installed and tested. Only domains/environments listed here will be supported during implementation, and only if Vergic resources are provided access to all environments.

3.2.4 Queue Wait Message

This is the message that’s displayed to visitors after they’ve requested a chat but before an agent has picked up the chat.

4 Users

4.1 Description

Anyone who logs into the Advanced Chat platform no matter the purpose (agents handling chats, admins changing settings, managers checking metrics) needs an account in the platform.

4.2 Fields

4.2.1 Name

The agent's name, this is only used internally (and never displayed to the visitor).

4.2.2 Display Name

The name that's displayed to the visitor during a dialog. It can be a first name, a full name, or any other name you see fit. It can also be a generic name such as "Customer Service".

4.2.3 Email

Each user needs a unique email address, and for any agents that will be working with chats the email address should match the value on the "Email address" attribute in NICE/inContact Central.

4.2.4 Groups

These are the groups/skills the user belongs to. A user can belong to any number of groups, they will only be able to handle chats for those groups.

4.2.5 Role(s)

These are the roles each user should have; these roles decide which access the user will have. It's possible to combine roles to ensure each user gets the correct access.

Please see the document "Roles and Permission_VEP_*.xlsx" for a complete list. Normally, regular agents should have only "User".

4.2.6 URL to profile picture

A direct link to the image that should be shown to the visitor during any dialog with this user. The image must be publicly accessible. If no image URL is entered, default avatars will be used.

5 Groups

5.1 Description

A group is a collection of agents, similar to skills in NICE/inContact. Each chat banner is connected to a group queue, and the availability status of that group will determine if/how that chat banner is displayed.

Multiple groups are required if agents are handling different languages or if they work with different issues.

A group can have three different states:

- OPEN – Within opening hours, at least one queue slot available
- BUSY – Within opening hours, no queue slots available
- CLOSED – Outside opening hours

Please note that a group can be busy with or without agents logged in, and a group is always closed outside opening hours even if agents are logged in.

5.2 Fields

5.2.1 Language

The language this group supports. If you have agents supporting multiple languages, each language should have a separate line in this list.

5.2.2 Group Name

The name of the group, this will be displayed in all statistics and is also used when doing transfers.

5.2.3 inContact Skill Id

Each group is connected to a skill in NICE/inContact, when a visitor joins the queue for this group the chat request is sent to NICE/inContact which routes it to an available agent with this skill.

5.2.4 Chat Start Text

This message is automatically sent when conversation is started (i.e. when both agent and visitor have joined).

The only variable available is [[name]] which will be replaced by the agent's display name.

5.2.5 Chat End Text

This message is automatically sent when the agent or visitor closes the conversation.

5.2.6 Opening Hours

The opening hours for this group. Each group can have different opening hours if needed. It's important to include time zone.

5.2.7 Queue Slots Per Agent

The number of queue slots each logged in agent will generate. This number multiplied with the number of available agents in the group will be the total number of queue slots for this group at that particular time.

Example: A group has a setting of 2, and there are currently 5 agents logged in. As long as the number of agents doesn't change, the queue for that group can hold 10 visitors. When the queue has 10 visitors in it, the group is considered busy and will stay busy until another agent logs in, a visitor is picked up for a chat, or a visitor drops out of the queue.

Please note that there is no correlation between this number and the number of active chats an agent has or can have, this number only limits the visitors in queue.

It's also worth noting that an agent will generate queue slots for all groups they belong to, and there is no overflow between group queues. If an agent belongs to two different groups each with the number set to 3, that agent will generate 6 queue slots in total but it's possible to fill the first group queue (making it busy) while the other remains empty.

6 Banners

6.1 Description

(Chat) Banners are the actual chat offers.

Please see separate design proposal for different banner types.

The following attributes can be changed:

- Colors
- Icon
- Image
- Font
- Text / Content

The banner can include input fields, dropdown menus, radio buttons, etc. Any information captured in the banner can be displayed to the agent when chat starts. For more information, see “Banner Text When Open” below.

6.2 Fields

6.2.1 URL

The rules used to define where and when a banner should be displayed. The rules can be very simple:

- All pages on the web site
- Any URL containing “checkout”

They can also be more complex:

- Visitor is logged in (please see below)
- Current URL is page A, last page was page B and not Page C
- Visitor has been on page D for 45 seconds

The rules can use both positive and negative checks (“URL contains”/”URL does not contain” for example).

For a rule to trigger based on for instance logged in status, that information needs to be readable in a cookie, local storage key or JavaScript object.

Please note: We recommend keeping the rules simple (i.e. using mainly URL matching) to maximize the number of visitors that are exposed to chat.

6.2.2 Name

The name of the rule, this is displayed in statistics and allows you to see how many saw the banner and also how many engaged from it.

6.2.3 Banner Type

The type of banner that should be used, please see design proposal.

6.2.4 Group

The default group any chat requests from this banner are sent to.

6.2.5 Case Type

Any chats started from this banner/rule will have this case type preselected.

6.2.6 Banner Text When Open

This is the content that should be displayed when the connected group is in state OPEN. This is the only state that will allow the visitor to join the queue.

This cell can include pseudo code to show for instance:

- Images
- Input fields
- Dropdown menus
- Buttons
- Links

Example:

<img CHAT.JPG>
Before we can help you, please tell us who you are.
<input field>Name</input field>
<dropdown>Are you an existing customer YES/NO</dropdown>
<button>Start Chat</button>
For more help, please click <link www.company.com/faq>here</link> for more information.

6.2.7 Banner Text When Busy

This is the content that should be displayed when the connected group is in state BUSY. This state will not allow the visitor to join the queue, and the banner content should reflect this.

It’s possible to not show a banner in this state.

6.2.8 Banner Text When Closed

This is the content that should be displayed when the connected group is in state CLOSED. This state will not allow the visitor to join the queue, and the banner content should reflect this.

It’s possible to no show a banner in this state.

7 Case Types

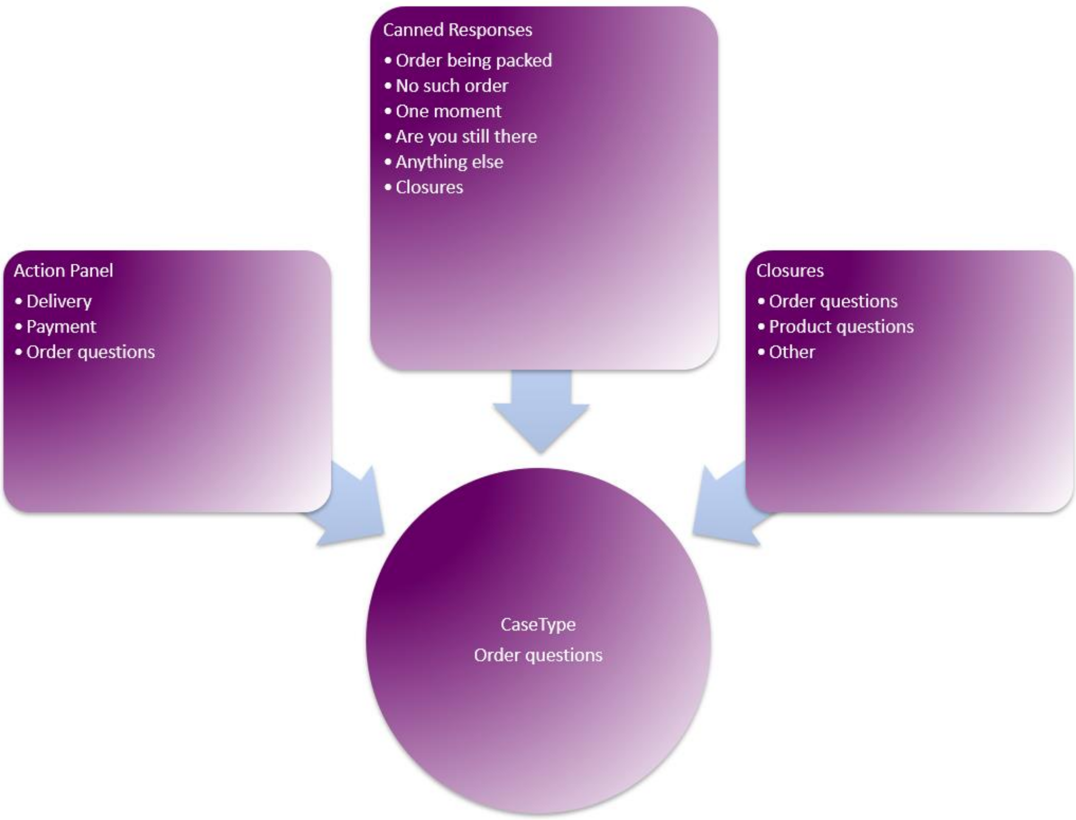
7.1 Description

Case types is a way of segmenting the different types of conversations the agents are having, for example "Order Questions", "Technical Support", and "Product Questions". This segmentation accomplishes two things:

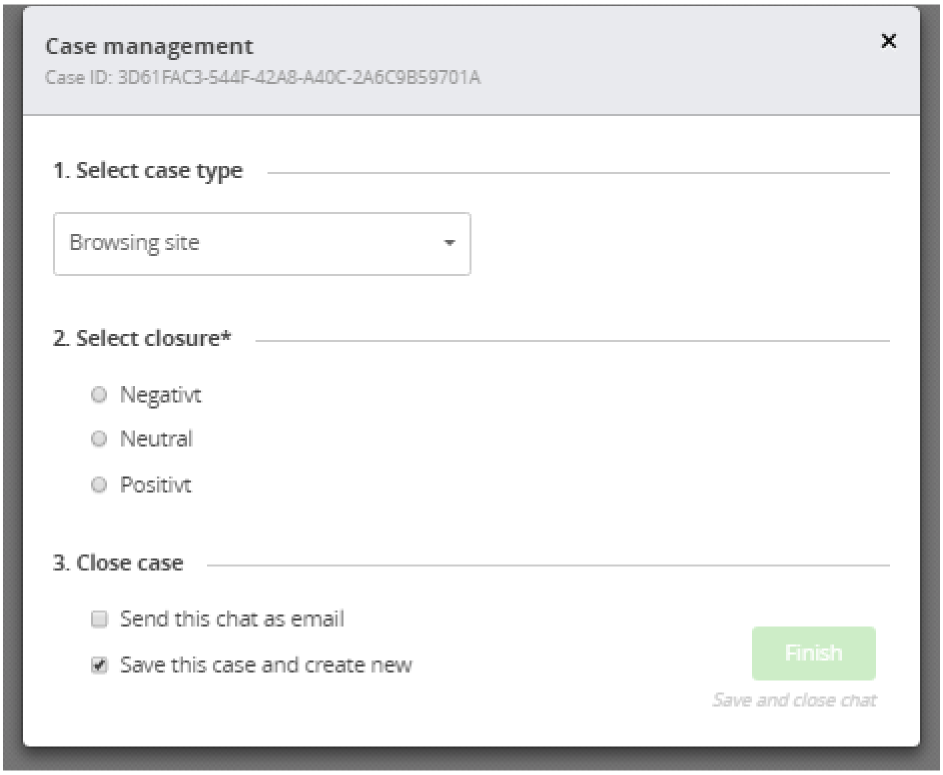
- Statistics will be more meaningful
- The agents get easy access to the most relevant information during chats

The statistics will show how many cases of each type were handled, and how they were ended (see chapter 7, Closures).

By connecting closures, canned responses, and actions to case types it's easier to ensure that the agents use the right information when working a certain case type.



An agent can change the current case type at any point, and it's also possible to close one case and open another of the same or another type during the same conversation. This does not affect the visitor in any way, it only allows the agent to log all the different parts of the conversation correctly.



7.2 Fields

7.2.1 Name

The name of the case type.

7.2.2 Group(s)

The group(s) that should be able to use this case type.

Several groups can be connected to the same case type.

7.2.3 Transcript Time-to-Live

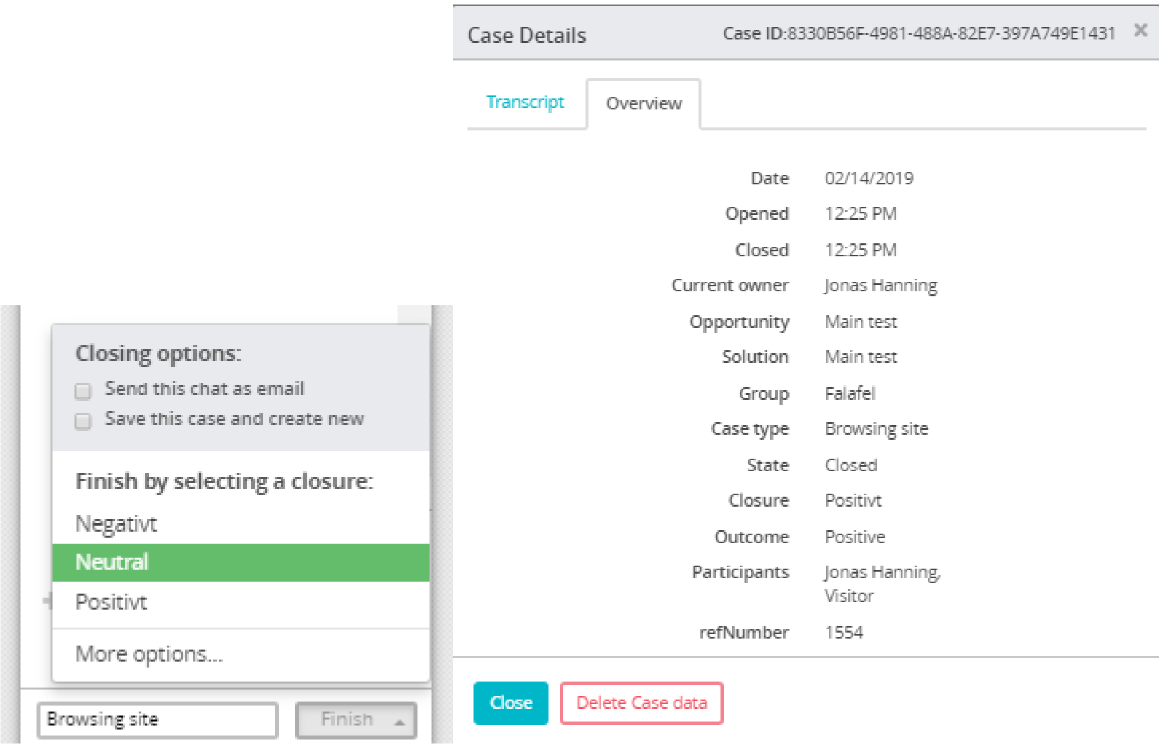
It's possible to have chat transcripts (the actual messages) automatically deleted after a certain period of time. All relevant chat metadata (date/time, case type, closure, agent information etc.) is saved.

It's possible to have different settings per case type, and it's also possible to not delete anything automatically.

8 Closures

8.1 Description

Closures describe the different outcomes a chat/case can have, this allows more detailed followup on cases.



8.2 Fields

8.2.1 Label

The name/description of the closure. This should be as descriptive as possible, instead of “Technical problem” use “Resolved technical problem” and “Couldn’t resolve technical problem”. Vague closures will make it difficult to see how well the agent’s are able to help the customers.

8.2.2 Outcome

How the outcome should be classified. There are three options:

- Positive

- Negative
- Neutral

The different options will affect the agent's success rate, so if the Advanced Chat platform is used for measuring this it's important to have well-defined closures with well-defined outcomes.

In the example above, "Resolved technical problem" would be Positive, "Couldn't resolve technical problem" would be negative.

It's a good idea to include some neutral closures as well, for instance "No one there", "Customer dropped".

8.2.3 Case Type(s)

The case type(s) that this closure should be connected to. These will be the only cases that can be closed with this closure.

A closure can be connected to several case types at the same time.

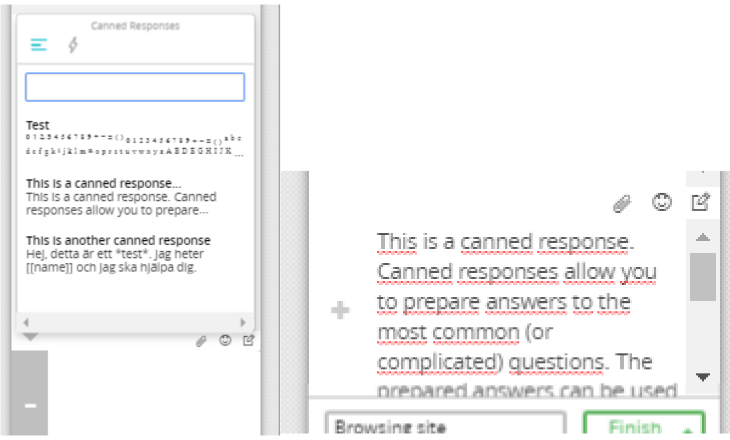
All case types must have at least one closure connected to them. If dispositions should be used in inContact, please put "Dismiss" or similar for each case type.

9 Canned Responses

9.1 Description

Canned responses are predefined answer to common questions.

Canned responses are never sent automatically, when selected they populate the agent's input field and the agent can then make any necessary changes before sending the message.



9.2 Fields

9.2.1 Label

The name/description of the canned response. This is displayed in the list when the agent is selecting a canned response.

9.2.2 Text

The actual text that is sent to the visitor.

This message can be no longer than 1000 characters, if longer texts are needed it's possible to create several parts which would then be selected and sent one by one.

There are no automatic variables/macros for use with canned responses.

9.2.3 Case Type(s)

The case type(s) that this canned response should be connected to. These will be the only cases where this canned response can be used.

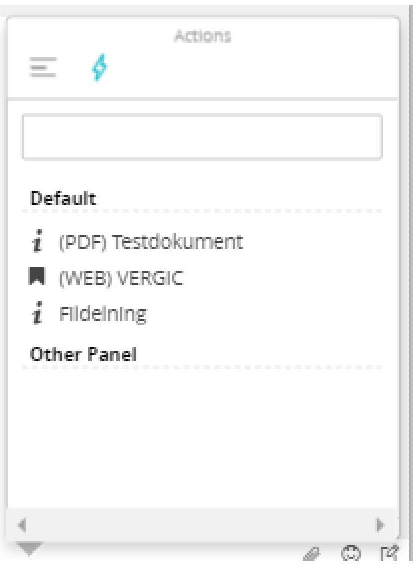
A canned response be connected to several case types at the same time.

10 Actions

10.1 Description

Actions are predefined links to web pages, documents, videos or any other online content that the agent should be able to send to visitor.

Actions are collected in Action Panels, these panels are then connected to case types.



10.2 Fields

10.2.1 Panel

The action panel this action should be connected to.

An action can be connected to several panels at the same time, the actions will then be available when a case type with access to either panel is selected.

10.2.2 Case Type(s)

The case type(s) that this action panel should be connected to. These will be the only cases where this canned response can be used.

An action panel can be connected to several case types at the same time.

10.2.3 Name

The name of the action.

10.2.4 Icon

The icon that should be used for the action:

- Webpage
- Info
- Product
- Pay
- Shoppingcart
- Shipping
- Action
- Group

10.2.5 Item Type

What is the action linking to? Possible options are:

- URL
- Video
- PDF
- Image

10.2.6 URL

The URL that should be sent to the visitor when the agent selects this action.

If the URL is on a domain that is whitelisted in the cobrowsing settings, the visitor will automatically be navigated to that page. The visitor will never be automatically navigated to another web site as that would end the chat.

If the URL is to an embedded video (for instance YouTube), the video will open in an embedded window in the current tab, thus keeping the visitor on the web site and the conversation alive.